

WISCONSIN DEPARTMENT OF ADMINISTRATION

Division of Energy Services

**PROGRAM & PLANNING ANALYST- Advanced
Financial Analyst**

POSITION SUMMARY

Under the general supervision of the Division of Energy Services Deputy Administrator, this position exercises a high level of fiscal responsibility for division budgets, program allocations and fund tracking. The position is responsible for significant technical and administrative program planning, contract management, and policy development for the Division of Energy Services which includes the Wisconsin Home Energy Assistance Program (WHEAP) and the Weatherization Assistance Program (WAP), collectively, the Home Energy Plus (HE+) Program, and the State Energy Office (SEO). This position administers and manages specific aspects of grant programs, analyzing data pertaining to the Division programs. Examples include; leading procurement teams; determining program funding availability; developing contracts and local grantee funding allocations, establishing contract goals, providing fiscal assistance to grantees; interaction with federal grant agencies; completion of federal grant applications; and, report review and completion. Additionally, this position develops agency allocations, contract conditions and is responsible for monitoring grantee performance, including grantee expenditures and production. Funding sources include state public benefit funds, federal block grants, formula grants, and competitive grants. This position will monitor funding from sources to enable program flexibility and review/monitor sub grantee and administrative expenditures to ensure compliance with funding source requirements.

TIME % GOALS AND WORKER ACTIVITIES

- A 30% Develop and Coordinate Grant Award Materials for the Home Energy Plus Programs and State Energy Office**
- A1. Lead research and analysis of program requirements related to funding for local weatherization and energy assistance agencies.
 - A2. Lead the analysis, development and determination of program funding availability for HE+ programs determining annual funding allocations for distribution to local grantees. Identify trends and fluctuations in agency expenditures being mindful of federal and state rules, regulations and laws pertaining to the use of specific funds.
 - A3. Monitor agency performance of cumulative contract spending and monthly claims activity.
 - A4. Lead the analysis, development, and determination of allocation of division contract funds.
 - A5. Analyze and assist in developing the fiscal portion of federal grant applications for the Division. This may include the Department of Energy (DOE) Low Income Weatherization Program; the Low Income Home Energy Assistance Program (LIHEAP) and the DOE State Energy Program.
 - A6. Provide input on development of the timetable to meet the grant application deadline. Apply grant evaluation and selection criteria, grant application revisions, and discuss program goals with fiscal staff and Deputy Administrator.
 - A7. Monitor fund accounts and advise management and staff of reported balances.
 - A8. Monitor federal and state awards ensuring accurate coding for funding sources and allocation of funds are within the authorized budget levels and in accordance with legislative intent/federal award.

A9. Develop the division operating budget and maintain up to date salary coding. Calculate salary increases/changes; review and adjust federal program category budgets and supporting backup information and, present amendment changes to Deputy Administrator.

A10. Work with management and staff to establish teams of subject matter experts to write goods and/or services solicitations; champion each solicitation through the procurement process start to finish.

B. 25% Provide Fiscal and Technical Assistance to Agencies and Outside Sources relative to procurement, grant obligations, contracts and purchasing

B1. Act as lead liaison with agencies and organizations providing technical contract management and fiscal assistance. In coordination with financial management staff, prepare fiscal responses to outside inquiries such as the Fiscal Bureau or legislators.

B2. Respond to agency inquiries relating to fiscal program matters including monthly invoice expenses, balance transfers or contracts.

B3. Act as lead within the Division for contract templates ensuring accuracy of contract boiler plate.

B4. Provide backup assistance to the Financial Specialist in preparing purchase requisitions and purchase orders.

B5. Assist with form completion and review grant applications for fiscal accuracy.

C. 20 % Fiscal and Budget Oversight for the Division's Programs

C1. In conjunction with the Division Budget Analyst and DOAS, lead monitoring of local grantee financial and program audits affecting division energy programs and assure timeliness of resolutions.

C2. In conjunction with the Division Budget Analyst, review and reconcile the Emergency Furnace program. Develop methodologies and tools as needed to ensure submittal of accurate reconciliation reports from local grantees. Identify compliance and/or program issues. Inform division management of any issues identified with recommendations for timely resolution.

C3. In conjunction with the Division Budget Analyst review operation manual language relating to new or revised financial and reporting procedures and propose modifications to division management as required.

C4. In conjunction with the Division Budget Analyst review and analyze budgets for appropriate charges and expenditure patterns using the State's Financial Reporting System (FIRSt) and the Purchase Plus System (P+).

C5. Recommend resolution of fiscal and budgetary concerns to Division management and accounting.

C6. Provide backup assistance to the Division Budget Analyst in the establishment of annual Public Benefits monthly fee.

D 20% Analysis and Generation of Reports

D1. Review, design and analyze financial reports utilizing internal and external automated accounting systems. Monitor expenditures for appropriateness and conformity with federal and state regulations.

D2. Develop and manage the overall allocation process utilizing spreadsheets and budgets.

D3. Participate in the review and resolution of program closeout reports.

D4. Work closely with system development staff involving the WisWAP and WHEAP Programs recommending system redesign as fiscal and program requirements change, or with recommendations of system enhancements to improve overall program financial integrity.

D5. Participate in meetings on matters of administration, program development, grant and fiscal management policy, and general Bureau or Division operating procedures, as required.

D6. In conjunction with the division budget analyst and WHEAP program staff, develop and maintain the division Continuity of Operations Plan.

E. 5% Other duties as assigned

KNOWLEDGE, SKILLS AND ABILITIES

- Knowledge of Home Energy Plus Programs including the Low Income Home Energy Assistance Program (LIHEAP), the Low Income Weatherization Program and State Public Benefits Program.
- Knowledge of competitive grant budgeting administered through the State Energy Office.
- Ability to read, interpret and apply complex laws, policies and procedures.
- Knowledge of contract development, negotiation, and grants management techniques.
- Knowledge of grants administration including program management, procedures and techniques.
- Knowledge of program planning, evaluation techniques, and policy analysis.
- County Government, non-profit entities and community agency structure.
- Federal regulatory, legislative, and budgetary procedures.
- Written and oral communication skills including technical writing skills.
- Skill in the use of Microsoft Office Products, including Microsoft Word, Excel, Access, and PowerPoint software.
- Skill in the use of the Internet and web-based computer program applications.
- ability to work effectively in a team environment and to secure cooperation and agreement in situations where conflicting objectives exist;
- Skills to present ideas and concepts.
- Ability to effectively train others in the technical aspects of managing grants.
- Analytical skills.
- Decision making and problem solving skills.
- Organizational skills.
- Interpersonal skills working on a team, with customers, etc.
- Recordkeeping skills.